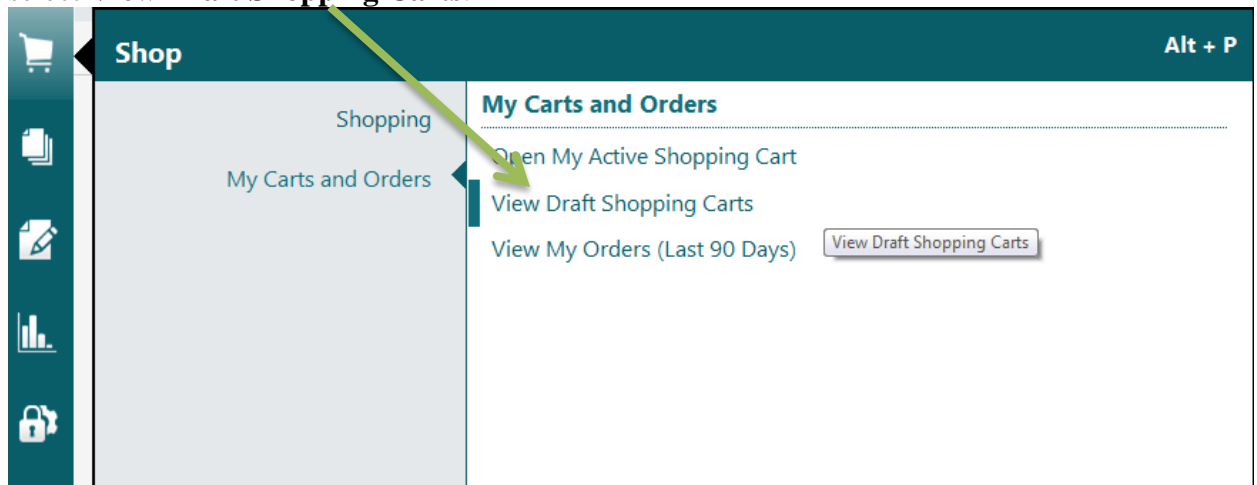


Assigning a Cart

This lesson will demonstrate how a purchaser can submit a cart to an assignee for review and completion.

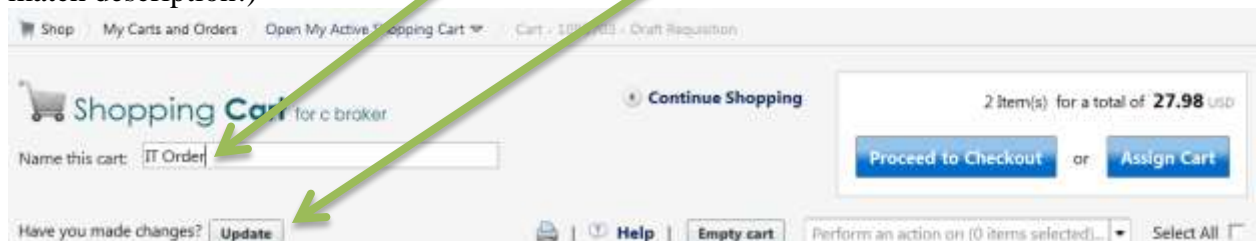
1. We'll begin by locating the shopping cart you've filled with items. To locate the cart, hover over the shopping cart icon, then hover over My Carts and Orders, and finally select **View Draft Shopping Carts**.



2. Click the shopping cart icon to the left of the cart you want to make active.



3. Click the cart name of the cart to view. Note that you can rename your shopping cart which defaults to the current date, username, and cart number. A more appropriate cart name might indicate what project the cart is related to or what the order is for. In this example, we will name the cart **IT Order**. Click **Update** to save. (Be sure items in cart match description!)

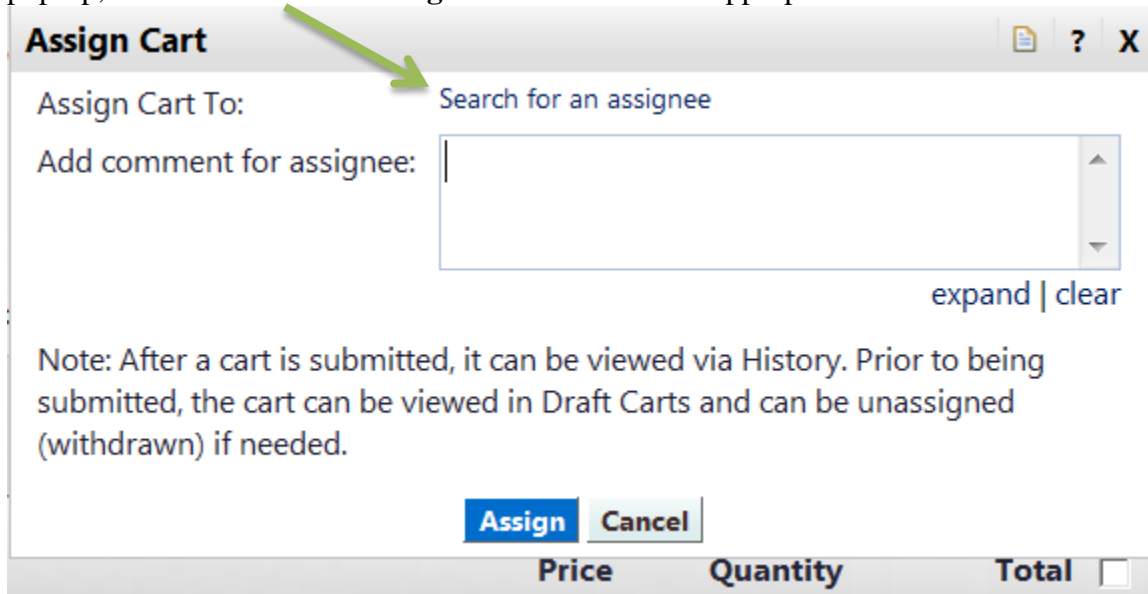


- After reviewing the cart contents, click the **Assign Cart** button on the right hand side of your screen.



***NOTE: If you have a pcard linked to your order/cart, please remove the pcard on this order prior to assigning the cart by going to “Proceed to Checkout” and “removing or un-assigning” the card. This is to protect you, the pcard holder, from having another individual add items to your order without your knowledge and allow them to place the order with your pcard. With the removal of the pcard it eliminates the risk of another individual utilizing your pcard for additional purchases. Once the pcard is removed and the order has been assigned for “review/approval,” when you receive your cart back, you can add your pcard onto the cart and place your order. If you do not have a pcard this would NOT apply.**

- The assign cart pop-up displays. If your default assignee does not appear at the top of the pop-up, click **Search for an assignee** to search for the appropriate Purchaser.



Assign Cart

Assign Cart To: [Search for an assignee](#)

Add comment for assignee:

[expand](#) | [clear](#)

Note: After a cart is submitted, it can be viewed via History. Prior to being submitted, the cart can be viewed in Draft Carts and can be unassigned (withdrawn) if needed.

[Assign](#) [Cancel](#)

Price	Quantity	Total
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- Type in the last name of the Purchaser and click Search. If you do not know the last name, by leaving all fields blank and clicking the **Search** button will display all your assignee options.

User Search - Windows Internet Explorer provided by State of Wisconsin

https://wisbuytest.sciquest.com/apps/Modules/General/UserSearch?moduleId=1309520093442348&returnFunction=selectAssignee&restrictByPersonalizedPermissions=Perm_Personal

User Search

Last Name

First Name

User Name

Email

Business Unit

Results per page

Search

7. Click the **Select** button to choose the appropriate Purchaser.

New Search **Close**

Results per page Page 1 of 1

Users meeting the search criteria: 1

Name	User Name	Email	Phone	Action
Administrator, Amanda	aadmin	nobody@sciquest.com	+1 (919) 555-5555	[select]

8. Check the **Add to Profile** box to store this assignee in your Profile for future use. Once stored in your profile, you may select this assignee's name from the Select from Profile Values link. Next, **add a comment to the assignee** for the order. This comment will display in the email to the assignee when they are notified of having an assigned cart to review.

Assign Cart ? X

Assign Cart To: **Amanda Administrator**

[Search for an assignee](#)

☒ **Add to Profile**

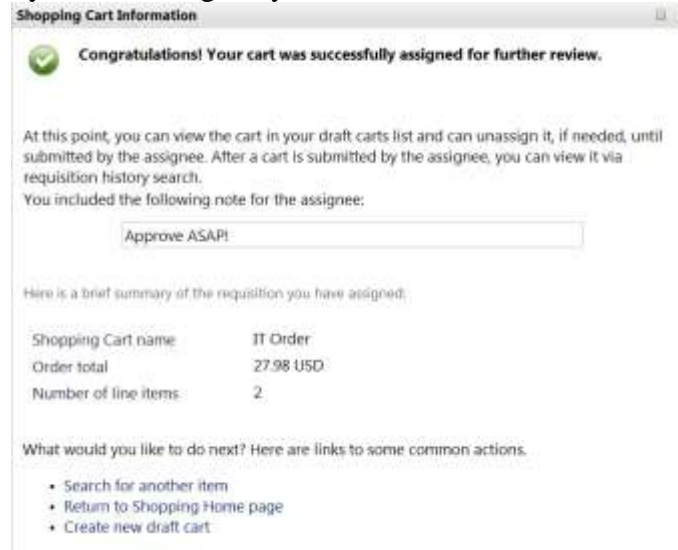
Add comment for assignee:

expand | clear

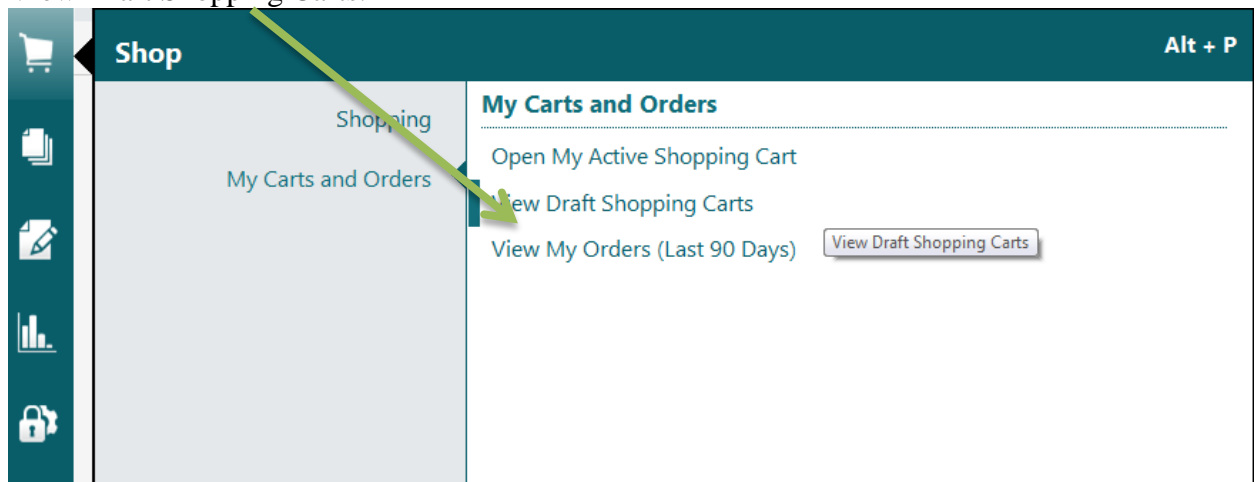
Note: After a cart is submitted, it can be viewed via History. Prior to being submitted, the cart can be viewed in Draft Carts and can be unassigned (withdrawn) if needed.

Assign **Cancel**

9. Once the assignee is selected and the comment completed, click **Assign**. You will receive a confirmation that you have assigned your cart.



10. To view your assigned carts at any time, go back to the Draft Carts page by hovering over the shopping cart icon, then hovering over My Carts and Orders, and finally selecting View Draft Shopping Carts.



11. You will notice a section of that page designated My Drafts Assigned to Others, which displays all carts that you have assigned to others for review.

My Drafts Assigned to Others						Legend
View Cart	Cart Number	Shopping Cart Name	Date Created	Assigned To	Total	Unassign
	1095703	 IT Order	2/17/2014	Amanda Administrator	27.98 USD	Unassign

12. If for any reason you wish to unassign a cart, click the **Unassign** button on the right. The previously assigned cart will go back to the My Drafts section above, and you can then edit the cart, delete the cart or choose another assignee for the cart.

This concludes the lesson on Assigning a Cart in WISBuy. For further assistance, please contact WisBuy@Wisconsin.gov or visit the website.